



RETROSPECTIVE: MAKING A DIFFERENCE FOR BAY AREA YOUTH

**THE S. D. BECHTEL, JR. FOUNDATION'S BAY AREA
YOUTH DEVELOPMENT GRANTS 2008–2015**

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BACKGROUND

In 2008, following a successful career in corporate philanthropy in the Bay Area, Marcia Argyris¹ joined the S. D. Bechtel, Jr. Foundation. Under her leadership, the Foundation's direct service and capital grants to youth-serving organizations throughout the region grew significantly.

In the same time frame, and after the decision to spend down, STEM grantmaking also grew and it became obvious that there were many potential points of synergy across Youth Development and STEM. In 2012, the Foundation merged the Youth Development and STEM programs into a single Education Program, which supports a range of coordinated "in-school" and "out-of-school" efforts to give Bay Area children and youth the best possible start in life.

In 2013, the Foundation engaged in a strategy process leading to the decision to shift focus away from direct service grantmaking in favor of a limited number of strategic initiatives aimed at systems change. Marcia then began the process of negotiating final grants to local grantees. As of this writing, the process is largely completed.

In 2015, the Foundation engaged consultant Jill Blair to conduct a retrospective review of past support to Bay Area youth development organizations. This document quantifies and focuses on a subset of the work of nearly a decade in building and supporting a diverse portfolio, responding to the most promising proposals and most urgent needs of a wide range of youth-serving organizations in the region.

STUDY DESIGN

This report is based on:

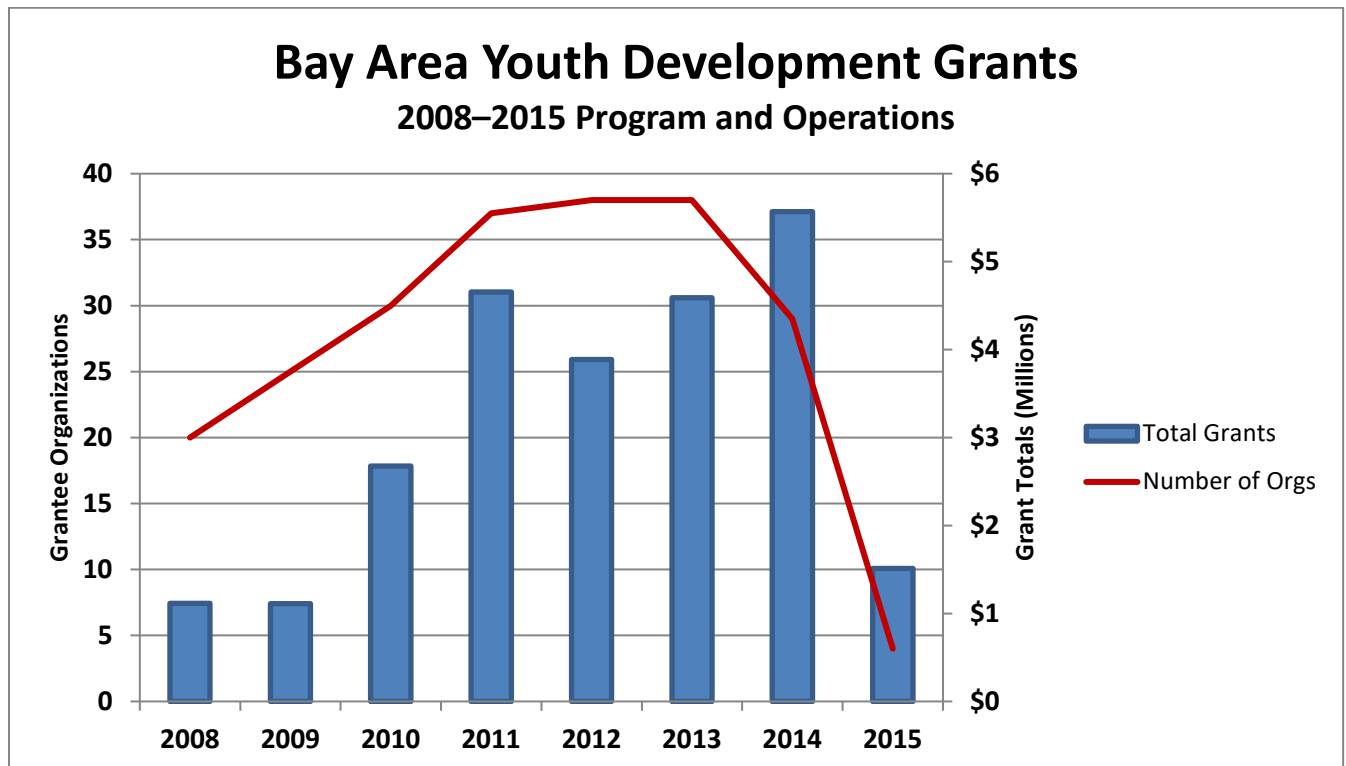
1. Two extensive interviews with Marcia Argyris;
2. Analysis of data on grant history and purpose for 82 grantees;
3. A file review of approximately 15 grantees, selected because they represent the diversity of the portfolio and had the potential to shed some light on the relationship between youth and character development;
4. Telephone interviews with eight of the 15 grantees; and,
5. Five case studies drawn from the eight telephone interviews and informed by site visits and in-depth interviews. Cases were selected because individually and collectively they reflect the spectrum of populations reached, services and systems supported, and organizational challenges faced by the portfolio overall.

In the pages that follow, the Foundation's grants to Bay Area youth development programs and organizations are described, and the perspective of selected grantees is shared through direct quotes. The case studies explore how grantees experienced the Foundation as a funder and partner in their work, and what was accomplished with the grant funds awarded. The report also includes a short set of lessons and recommendations based on observations of and feedback from the field.

¹ During her tenure with the S. D. Bechtel, Jr. Foundation, Marcia Argyris also led grantmaking in health and citizenship. In 2013, following the merger of Youth Development and STEM into a single Education Program, Marcia was named director of special projects and also remained an active member of the Education team, continuing to work with the significant portfolio of youth development grants locally, while also helping to launch the National Character Initiative.

THE PORTFOLIO DESCRIBED

Under Marcia Argyris' leadership, the Foundation's Bay Area Youth Development portfolio grew exponentially. In all, 82 youth development organizations were supported between 2008 and 2015. During this time, the Foundation awarded \$26.4 million to Bay Area youth development organizations for a mix of programmatic and operational purposes. An additional \$14.6 million in grants supported the capital projects of 19 of these grantees, bringing the overall total in this area to more than \$41 million.



The average size of grants in this portfolio was approximately \$35,000 in 2009 with 25 organizations receiving funding that year. In 2012, 38 grantees were supported with an average grant size of \$81,000. By 2014, the number of grantees was declining as the Foundation concluded its relationships with local, direct-service organizations and shifted its focus to the National Character Initiative. In all, 29 local youth development organizations were supported that year with an average grant size of \$163,000.

Over the time period covered by this study, ten grantees received \$1 million or more of support.

Top Recipients of Bay Area Youth Development Funding 2008–2015*

Grantee	Program & Operations	Capital	Total Grants
Boy Scouts of America, San Francisco Bay Area Council	\$ 1,532,550	\$ 2,305,000	\$ 3,837,500
Center for the Collaborative Classroom	\$ 3,150,000		\$ 3,150,000
Girl Scouts of Northern California**	\$ 2,110,000	\$ 1,000,000	\$ 3,110,000
YMCA of San Francisco**	\$ 672,000	\$ 2,150,000	\$ 2,822,000
Positive Coaching Alliance	\$ 764,500	\$ 2,000,000	\$ 2,764,500
Boys and Girls Club of San Francisco	\$ 855,000	\$ 1,450,000	\$ 2,305,000
East Oakland Youth Development Center**	\$ 760,000	\$ 1,000,000	\$ 1,760,000
Girls Incorporated of Alameda County**	\$ 580,000	\$ 1,000,000	\$ 1,580,000
Boy Scouts of America, Piedmont Council	\$ 1,175,000	\$ 15,000	\$ 1,190,000
Larkin Street Youth Services**	\$ 1,050,000		\$ 1,050,000
TOTAL	\$ 12,649,050	\$ 10,920,000	\$ 23,569,000

**Excludes National Character Initiative grants*

***Case study organizations*

Note: Many of the organizations listed above received Foundation support prior to 2008. This study reflects the period following the spend-down decision to the present. The grants provided above are listed in further detail in the attachment.

Boy Scouts of America, San Francisco Bay Area Council. The Scoutreach program, which recruits boys from low-income areas to join Scouting, was supported consistently by the Foundation, as was a literacy program, and professional development for local staff members. In addition, the Foundation supported capital projects related to facilities at Camp Royaneh and Wente Scout Reservation.

Girl Scouts of Northern California. The Northern California chapter of Girl Scouts ran a variety of initiatives during the last decade, from environmental science, to online resources for volunteers. To ensure that all Bay Area girls have access to Scouting, the Foundation supported the launch of new troops in low-income areas, and provided camperships. The Foundation also supported remodeling of the Y-SF Early Childhood Development Center, Teen Center, e-Learning, and its Family Life kitchen.

YMCA of San Francisco. Leadership programs for youth and core values training for staff were consistently funded by the Foundation. The “train the trainer” model was employed, which involved developing a cohort of staff members to become experts in the material, so that they could run sessions of their own at all of the Y-SF’s 14 branches. In addition, the Foundation supported the construction of the Delta Family YMCA building and Teen Center in Oakley.

Positive Coaching Alliance. The Foundation supported Positive Coaching Alliance to train 87,000 AAU coaches. In addition, grant funding supported communications and technology infrastructure for program expansion. PCA is currently a candidate for possible inclusion in the National Character Initiative.

Boys and Girls Club of San Francisco. Between 2009 and 2015, the Foundation supported the “Character Counts” program at Camp Mendocino, as well as character programming at the Sunnydale and Visitation Valley clubs. The Foundation also supported the capital campaign for a Club House for Camp Mendocino.

Center for the Collaborative Classroom. The Foundation’s support of the Center focused on the Caring School Community Program. This program uses classroom and school-wide community activities to foster social and emotional skills among students. Grants enabled programs to operate in 16 different Oakland Unified School District locations, and supported professional development for faculty and staff involved.

East Oakland Youth Development Center. Beginning with a summer Cultural Enrichment program, the Foundation went on to support leadership development programs, professional development for staff, and program evaluations at the East Oakland Youth Development Center. The Foundation supported upgrading the Center’s 30-year-old facility, as well as the introduction of new leadership positions to create a more robust management infrastructure.

Girls Incorporated of Alameda County. A girls’ early-literacy program, teen achievement program, and a character development program for the youngest participants at Girls Inc. were all supported by the Foundation, as was a strategic planning process in 2014. The Foundation also made a significant capital grant to support the purchase and renovation of a building in downtown Oakland that has become the organization’s new headquarters.

Boy Scouts of America, Piedmont Council. The Foundation supported the Piedmont Council consistently with general operating grants, as well as those for Scoutreach, and renovation of the new Scout room.

Larkin Street Youth Services. The Foundation supported an education and employment program for homeless and runaway youth, as well as evaluation, knowledge dissemination, and the development and implementation of a three-year strategic plan.

THE FOUNDATION'S APPROACH

Within the Bay Area Youth Development portfolio, the Foundation supported a range of efforts, from training programs for paid staff and volunteers to strategic planning, data collection, capacity building, operational infrastructure (e.g., new staff positions, systems development, equipment, etc.) and occasional capital projects. In every case, the investments were aimed at increasing grantee capacity to deliver high-quality programs to youth, and in many cases the support was provided with a focus on the value of character in the youth development process. While there is variation in how funds were used among grantees, there is great consistency in how they describe the Foundation itself – as a partner, an advocate, and a compassionate collaborator. In the words of one grantee:

We have had a unique relationship with the Foundation since 2009 . . . a partner to us in so many aspects of our work and development. They have been our evolutionary investors – enabling us to test ideas and then supporting us in implementing them. The Foundation is one of the reasons we are a cutting edge council and serve as a model for others.

The Foundation will be missed as much for the guidance and partnership it extended as for its funding. It is evident that the Foundation distinguished itself not only by the level of its support and commitment to the community, but by the nature of the relationships it developed with grantees. What follows are the qualities that were consistently cited by grantees as descriptive of the Foundation's giving approach:

Flexible: Showing a willingness to accommodate differences; to shift or redirect resources according to the changing needs or priorities of a grantee.

What's been extraordinary is that Bechtel has recognized our needs and been flexible in their support of us.

The Foundation has been engaged in so many different ways, responding to all kinds of needs. We have no other donor that has done as much and in as many different ways as Bechtel.

Caring: Practicing authentic engagement that is respectful, responsive, and understanding of the challenges of working in difficult circumstances with marginalized and sometimes hard-to-reach populations.

The Foundation's decision to close is . . . sad because they have been so special in their approach – so open-hearted.

No other funder has so understood the relationship between curriculum (what we are teaching), people (who we are reaching), and place (where we are reaching them). The Foundation is present and engaged in the real world in which we work.

Trusting: Following the grantee's lead regarding how Foundation funding can make the most difference.

Marcia has always let us use the funding in ways that make sense for us both – she was always in conversation with us about the Foundation's interests and our interests and finding where they intersect – which is distinct from funders who assume that their needs and interests are not only smarter but more urgent.

Direct: Willing to communicate forthrightly regarding the Foundation’s evolving emphasis on character as well as the Foundation’s spend-down plans.

Marcia is lovely. Very easy to work with – handled the spend down gracefully, provided ample notice, was thoughtful about how to close out the funding, given that they fund at significant levels. Their sensitivity and thoughtfulness were unique and appreciated. That’s not always how it goes.

Evolving: Changing and growing alongside the grantees in true partnership.

The unique quality is the partnership – the partnership has had a powerful and lasting impact on our organization.

Grantees report that the Foundation’s influence in local youth development has been achieved largely by virtue of the humanity, compassion, and sensitivity it demonstrated with the level and duration of support as well as its overall approach to giving. One leader expressed this as follows, “Bechtel is in a class of its own as a compassionate collaborator – a true partner. They want what we want.” Another, reflecting on the Foundation’s eventual sunset, said:

I think when you lose a thoughtful funder who understands the value of building a relationship and is invested for the long haul, it is significant. Not every foundation is as transparent or as thoughtful as the team at Bechtel has been – even in the process of closing out our grant, they gave us time and attention in that process as well.

Grantees also expressed a hope that the Foundation will share its experience with others in the field and promote the value of sustained funding that is evolutionary and trust-based; support that is intended, without hubris, to cultivate community institutions that are strong, adaptable, and enduring.

THE FOUNDATION’S EVOLVING FOCUS ON CHARACTER

Prior to 2014 when, under its founder’s direction, the Foundation launched the National Character Initiative, Marcia Argyris – who was already a strong proponent of Social-Emotional Learning – brought a more explicit conversation about character to the Foundation’s Bay Area grantees.

At first glance, it may appear to be a subtle difference to turn one’s attention and resources from youth development in general to character development, but based on this review and the conversations it enabled, the shift is significant and complex. According to the grantees, even those that did not fully adopt the character development frame, the shift brought greater precision to their intentions. It required grantees to think carefully about the concept of character, what it means, how it shows up, and how it can be influenced. In some cases, grantees had already been using the language of character and the Foundation’s focus and support brought those organizations to a new level of examination and ultimately appreciation for the concept. For others, the focus on character development required a reorientation, an assessment of assumptions, and an appreciation of a different perspective.

Grantees described how the Foundation provided resources to enable their investigation of the concept of character and how to employ the concept in their work. From the Character Counts!² framework, including access to consultants specializing in character-based curriculum and professional development, to the supportive counsel provided by Foundation staff, grantees expressed gratitude for the guidance the Foundation provided in helping them place character development in the frame of their youth development efforts.

If you are going to build adult skills for positive relationships with youth, you have to be respectful, responsible, caring, and honest. These are the traits of good character, and they are deeply embedded in our work.

Character development is a natural outcome of positive youth development being implemented well.

Grantees shared how, at the prodding of the Foundation, they examined the meaning of character in the context of the communities they serve. Grantees define and experience community in a myriad of ways – economically, educationally, racially, ethnically, culturally, and linguistically. By advancing character development, the Foundation inspired within each organization a self-consciousness about how young people learn to make choices and the pressures they face in doing so. It caused organizations to consider the relationship between circumstances and character – how they influence and reflect on each other. Organizations described deep questions they faced in the process of focusing on character development – questions about cultural values, language, and expectations. Most importantly, while youth development implies a process that naturally occurs as young people eventually grow up, character development requires attention be paid to meaning and modeling. With a focus on character development, there is a critical need for young people to not only understand but observe in the adults around them what character is, why it is important, and how it is expressed.

The Foundation grantees did not always find this examination of character in relation to youth development to be easy or direct. Several organizations stated that when they were first advised of the Foundation’s interest in character development, they were concerned that there was an ulterior motive to advance a particular set of values at the expense of cultural diversity. In the local work, grantees sometimes felt that the language was more important than the intended results and that they were being expected to employ language that may or may not resonate with their communities.

The experience of working with the Foundation on this enterprise, however, revealed even to skeptics that character development is of consequence to all. The benefit of attention paid to character accrues to all as well. So what may appear to have been a subtle shift in language and approach was not experienced that way by the grantees interviewed for this study; rather, it was experienced as a significant shift in perspective about how to develop healthy, productive, and engaged youth.

² Character Counts! is used in schools and youth, sports, and civic organizations. It is one of the nation’s most widely used character development frameworks. It is based on six Pillars of Character: Trustworthiness, Respect, Responsibility, Fairness, Caring, and Citizenship.

CASE STUDIES

Each of the following brief case studies offers:

- Comments and reflections on the role and distinguishing qualities of the Foundation as expressed in the words of grantee staff and leaders;
- An overview of the work of the organization and the context for that work;
- The origin, nature, and tenure of the relationship between the organization and the Foundation; and,
- How and whether the organization embraces and expresses character development – including how it has changed over time and as a result of the Foundation’s support.

While there are themes that emerged in the course of the interviews related to the role of the Foundation, the value of its support, its approach to funding, and the lasting difference that support is making, there are also experiences that are unique to each organization based on the work of the organization, the population served, and the nature of the Foundation’s grant. These write-ups are based on interviews with agency staff and leaders. They are not intended to serve as complete “organizational biographies” but rather stories of the relationships that were forged between the Foundation and the organizations through the eyes of those who lived those relationships. Each case is a snapshot taken at a moment when the organizations are grappling with the loss of the Foundation as a partner in their work – a moment ripe for reflection on the difference that such a partnership has made. Although many of these organizations received Foundation support prior to the decision to sunset, the stories that follow represent grants made between 2008 and 2015.

CASE STUDY #1: GIRL SCOUTS OF NORTHERN CALIFORNIA

Twelve grants totaling \$3.11 million

Almost all of our training now is done online. The support we have gotten from the Foundation has allowed us to take everything to the next level.

This support has put us in the center space – given us a position of influence with our peers and by that, influence with national. We hope they share their learning from these interviews with other funders so that people understand how valuable this approach to philanthropy really is. The Foundation got so much more bang for its buck than other funders just by building a relationship with us.

Context

The mission of the Girl Scouts could hardly be more aligned with the Foundation’s character development focus. “The Girl Scouts builds girls of courage, confidence, and character who make the world a better place.” The Girl Scouts of Northern California pursues this mission by serving a total of 47,000 girls in programs across 19 counties from Santa Clara to the Oregon border. Some 3,500 girls are engaged through funded outreach programs (including troops that are led by paid rather than volunteer leaders); 11,000 girls attend Girl Scout camp only; and the balance participate in the traditional volunteer-led Girl Scout troops. The Foundation’s support touched every part of this organization: from outreach to enable troop formation in economically challenged communities that lack volunteer capacity to e-Learning programs that enable efficient, effective, and culturally appropriate online training for volunteers. Girl Scouts of Northern California provides girls with opportunities for engagement and positive self-expression while cultivating skills, knowledge, and social competence.

The Foundation's Support of Girl Scouts of Northern California

Girl Scouts received a total of \$2.11 million in program support through both education and character development as well as \$1 million in capital funding for camp renovations from the Foundation since 2008. The Foundation supported Girl Scouts across a range of activities, programs, and initiatives – with a particular focus on making the Girl Scout experience more accessible in economically challenged communities, including communities of color.

When Girl Scouts began its relationship with the Foundation, it was – by its own description – a “butts in seats” 20th century operation, relying on staff in the field to train volunteers using 20th century classroom instructional techniques. Everything the Foundation supported was about moving the organization into the 21st century – not only in terms of who it serves but how it serves. The conversations between the Girl Scouts of Northern California and the Foundation were about reaching new populations; creating new methods of engagement and learning; cultivating partnerships that would yield efficiencies and benefits; better use of information to understand impact; and the very viability of the organization overall. The Foundation and the grantee shared a commitment to character development but also to reaching diverse populations and making the Girl Scout experience relevant and meaningful to a changing community.

The Foundation encouraged and financially supported the Council's many efforts to extend the Girl Scout experience to more diverse communities and populations, which included an e-Learning capacity-building grant. With Foundation funding, the Council was able to hire staff and design and implement an online training program. In 2014, the Council had 8,500 course completions through its e-Learning modules. That number grew to over 24,000 in 2015. It has the largest adult volunteer membership of Girl Scout Councils across the country and one of the highest volunteer retention rates as well. The greatest percentage of online learning enrollment occurs among rural communities across California – meaning that the Foundation's support is achieving its original intention of bringing the Girl Scout experience to the most marginalized communities. The Council is now repurposing more than 75 e-Learning modules for use by the Greater Los Angeles Girl Scout Council and serves as a resource to Girl Scouts USA on expanding online learning opportunities.

Looking Ahead

The Foundation left a significant mark on this organization – enabling the creation of new approaches to parent engagement, volunteer recruitment, and training; an enlivened and creative embrace of data collection; new STEM curriculum and a new partnership with NASA for space and science education; an exchange of practice with the Girl Scouts of Greater Los Angeles; and a welcoming national platform at Girl Scouts USA for sharing innovation and striving for continuous improvement. Girl Scouts Northern California Council, like other Councils across the nation, is still in transition – still accommodating a changing environment and still working to revise its business model, including its relationship to national, to ensure sustainability.

Where Character Fits In

There is strong alignment between how the Foundation has framed and approached character development and how Girl Scouts represents its commitment to the concept. This alignment is reflected in some of the outcomes its programs aim to achieve, including: Think Critically; Make Decisions; Solve Problems; Work Cooperatively; and Form Healthy Relationships.

CASE STUDY #2: THE YMCA OF SAN FRANCISCO (Y-SF)

Nine grants totaling \$2.9 million

The Foundation helped Y-SF strengthen and generate critical partnerships and create new and sustainable internal capacity to develop, deliver, and evaluate youth and character development training efforts.

There's been a lot of guidance that the Foundation has provided. Marcia has made introductions. She has been great to bounce ideas off of. She has given us visibility and prominence. She has been a great partner – not just “here's the money.” She's been a guide.

Context

The YMCA of San Francisco (Y-SF) provides comprehensive services addressing wellness and social needs from Marin County to the Santa Cruz Mountains across 14 semi-autonomous branches. Most branches are place-based, serve a specific geography, and have membership; the exceptions are: (1) Point Bonita Conference Center (an outdoor education program); and, (2) Urban Services, which provides mental health and social services to high-need populations.

Y-SF's Association office serves as a resource to all of the branches and helps establish consistent standards and practices to ensure fidelity to the brand. In that capacity, the Association facilitates working groups with representation from each branch on relevant and common issues such as aquatics programming, membership, and after-school programs. In 2011, the Association formed a working group to find ways to ensure that youth development training for adults, practices, and culture would be consistent, of high quality, and sustainable over time. Up until that point, branches were approaching professional development independently, using different frameworks and practices.

The Foundation's Support of Y-SF

Linda Griffith, a Y-SF Vice President, attended a workshop offered by Be the Change Consulting, based in Oakland (also supported by the Foundation) that provides curriculum development, training, and coaching to nonprofit organizations across a range of issues, including youth development and character education. Y-SF began a conversation with Be the Change about designing a youth development training program for staff. The goal was to develop one training framework and a delivery model that would be sustainable. Be the Change designed the content and developed a “train the trainer” methodology that would achieve the goal of efficiency and sustainability and also cultivate connections by creating a trainer cohort across branches. This was a creative and efficient concept, but it would cost money to launch and test.

Y-SF approached the Foundation to explore potential funding for a partnership with Be the Change to design and deliver training modules to branch staff trainers. The Foundation awarded Y-SF a grant of \$12,000 – a modest investment, but enough to give structure and accountability to the effort.

In that first year, Y-SF created an application process and asked branch Executive Directors to help identify champions. The process led to the recruitment and training of 28 branch-based staff. The organization was able to launch a four-part training initiative covering Safety and Relationship Building, Youth Participation, Skill Building, and Community Involvement across almost all of the branches. Hundreds of staff members were trained in small and large group settings, and a training corps was established at each branch. The delivery model was so successful that in some branches, the site-based

training corps extended training beyond its own staff to include staff associated with after-school partners as well.

In the second and third years of support, 2014 and 2015, the Foundation enabled Y-SF to continue its work with Be the Change designing and implementing refresher training, adding new training modules, and establishing a partnership with Public Profit (to whom Y-SF was introduced by the Foundation) for purposes of evaluation and learning.

During this same timeframe, in anticipation of the Foundation's closure and loss of its financial support, Y-SF focused on sustaining this new approach by establishing two faculty cohorts – the Youth Development Training Faculty, which is now responsible for both the training and the Trainer Learning Community; and an Evaluation Faculty Cohort that has been trained in evaluation principles and assumed leadership in evaluating how well and consistently staff understand and implement the principles of character and youth development in their work.

In addition to the transfer of skill and knowledge through what has become a branch-based training capacity, the trainers have formed a community of their own that enables more cross-site learning and support. According to Vice President Linda Griffith, “the quality and value of the trainers’ cohort continues to broaden and deepen over time.”

Looking Ahead

Y-SF was able to achieve a significant change in the way it does its business with Foundation support – establishing standards of practice and professional development for staff, building new capacity to deliver staff training, and cultivating staff leadership on critical issues of program and services. The Foundation arrived at the right moment with the right attitude and the right level of support to enable Y-SF to test an idea that has proven to be a success. As a result, the Y believes it is, and from all indications appears to be, well positioned to continue down the path it was able to forge with the Foundation's support even as that support comes to a close.

Where Character Fits in

Unlike some other grantees that lead with character development as a focus of their work, Y-SF continues to lead with youth development as its primary organizing frame. It describes character development as an “outcome” of high-quality youth development programming. For this organization, the emphasis on character development places “too much responsibility on the child to make the right choices and do the right thing” without ensuring that the child is in a position and has the right skills and support to enable good choices. Y-SF sees its youth development framework as establishing the conditions that enable good character to emerge.

However, in the process of working closely with the Foundation, Y-SF was able to clearly connect its four fundamental values – respect, responsibility, caring, and honesty – to the concept of character. Foundation support enabled Y-SF to adopt and implement a single youth development framework for its staff and an association-wide “train the trainer” approach that established consistency, ensures quality, and builds sustainable capacity. In the words of the grantee:

Before the work with the Foundation, the branches were approaching the issue of youth development and staff training differently, using different practices. The thinking behind this new approach was it would be unifying across branches and ultimately embed within our own organization the capacity to adapt and grow.

CASE STUDY #3: EAST OAKLAND YOUTH DEVELOPMENT CENTER (EOYDC)

Eleven grants totaling \$1.76 million

Let me just say unequivocally the Foundation investment has changed our world . . . character was an underpinning of all of our programs but we hadn't called it out.

The Foundation has been structurally influential – providing support and guidance from renovating our building to developing our leadership team – and influenced our souls, our core.

Context

East Oakland Youth Development Center (EOYDC) provides children and youth aged 6–24 with a range of programs and services bridging art, education, health/fitness, and career. The inspiration for EOYDC came from Robert Shetterly in 1973, who was CEO of the Clorox Corporation, headquartered in Oakland.

Over the course of more than three decades, EOYDC has weathered many challenges and changes. Between 1978 and 1996, a number of different executive directors led the organization – a tumultuous launch and landing. Programs and services expanded and the annual budget exploded from approximately \$600,000 to over \$1 million as the agency responded to funder demands and community need. The organization was growing without a clear plan and was, by some accounts, in “mission-drift.”

In 1996, Shetterly launched yet another search for an executive director. At the time, Regina Jackson was serving on the board and Shetterly approached her about taking the post, cautioning that it would be necessary to cut the budget by 50% and refocus the agency on its core purpose. Both Shetterly and Jackson were worried about sustainability and concerned that the agency had over-reached, had gone too broad without enough depth. Regina assumed the post in 1996. Under her leadership, some programs and services were eliminated and the agency reaffirmed its core purpose and dramatically reduced spending. Regina continues to lead the agency today.

The Foundation's Support of EOYDC

Since 2008, the Foundation granted EOYDC a total of \$760,000 in program and organizational support as well as \$1 million toward its capital campaign. The Foundation's support was first applied to program, to bring the concept of character development to the fore. The second round of support went toward strategic planning, visioning a future both programmatically and operationally. The most recent support contributed to building – both literally building, in terms of physical renovations, and also figuratively, building the management structure and staff capacity to carry the organization into the future.

The first grant to EOYDC in 2009 enabled staff to attend a training program on the Character Counts! curriculum, introducing the construct as an organizing frame for the agency. The staff returned to EOYDC with an appreciation for how far reaching the concept of character is – that “character shows up in everything people do.” As staff reflected on that experience, they noted that in order for the agency to fully embrace character as an organizing principle in its work with youth, every staff member would need to understand the meaning of character and how to model it in their work and lives.

We realized that we needed to be consistent ourselves – to not just talk about good character, but to show it by how we as an organization behave ourselves.

It's awesome that the Foundation chose to promote a non-cognitive aspect of youth development – to recognize the importance of the “soft stuff” in human development – that we need not only smart people but good people.

The most recent capacity-building support provided by the Foundation enabled EOYDC to upgrade the executive director position to president and chief executive officer and to create a new position focused on internal operations and management – the vice president for organizational effectiveness. That position was filled by an EOYDC alum.

Looking Ahead

Programmatically: EOYDC has experienced an ebb and flow of enrollment over the years and is now emerging from a period of intentional downsizing that was planned and managed as part of the capital construction project. During the construction period, EOYDC offered programs off-site and numbers were significantly diminished as a result. At the height of enrollment, EOYDC was serving more than 2,000 youth, though many of those youth were participating sporadically. Currently the agency is serving approximately 500 young people. While these numbers are expected climb now that the agency has taken occupancy of the renovated space, EOYDC has also made a conscious decision to work with fewer young people in deeper and more consistent ways. This shift may require developing, changing, or increasing standards for program participation, but it will also allow EOYDC to better measure the impact it is having on the lives of those youth. Developing better data systems, evaluating impact, and using data to inform practice are emerging as higher priorities for EOYDC – along with improving recruitment and retention of middle school students into programs and services. Both of these efforts will benefit from the support EOYDC is now receiving as a PropelNext grantee³.

Financially: EOYDC has had the benefit of a \$9 million endowment that provides a significant percentage of its operating budget. It has historically secured limited funding from foundations, less than 10% of operating expenses, and a similar percentage from governmental sources. EOYDC is mindful of the importance of shifting its business model, including raising its public profile and diversifying its funding base. It is exploring different ways to deliver programs, generate revenue, and increase its public presence.

EOYDC has an opportunity with respect to two of its high-demand programs – summer camp and Pathway to College and Career – to change the business model in order to offset expenses and potentially generate a revenue stream. These two programs, along with all programs offered by EOYDC, are made available at no cost to the community and without income eligibility requirements. They are subscribed essentially on a first-come, first-served basis. (Pathway to College and Career does include a selection process, seeking applicants who meet academic standards and demonstrate qualities of character.) In the case of Pathway to College and Career, which offers participants guidance and support in the college application process, as well as college campus tours in- and out-of-state, staff indicated that many of the middle-class families in the community have come to know the program and in recent years have dominated the pool of applicants and participants. In some cases, middle-class families have actually offered to pay for their children to join the program after it is fully subscribed. This level of demand combined with ability to pay may offer EOYDC an opportunity to create a revenue-generating

³ PropelNext was launched by the Edna McConnell Clark Foundation in 2012. The program provides unrestricted grants (on a competitive basis) to a select group of nonprofits to help them strengthen their capacity to use data for learning and ongoing improvement. In addition to funding, the grantees receive coaching and participate in a peer learning community.

version of the Pathway to College and Career program and institute income eligibility standards for the current program in order to ensure that opportunities are extended to the populations most in need. This option is under discussion presently.

With respect to summer camp, EOYDC has been offering a six-week summer day camp program that is very popular in the community. The program costs the agency approximately \$1,600 per camper, while the registration fee for the program has been fixed at \$80 per child. This year, for the first time, EOYDC is introducing a sliding fee schedule with a ceiling of \$400 for the full six weeks. While the maximum fee does not cover the actual program cost, it does provide an offset. The team intends to examine how this fee structure plays out from both a demographic and financial perspective.

Organizationally: Over the course of 37 years, EOYDC has emerged as an important and influential institution – creating and delivering programs and services to the community; providing a safe space for children to grow and thrive; offering outlets and inspiration for health, fitness, and artistic expression; and providing supportive pathways for educational and career pursuits. At different moments, the agency has had to pause, consider, and at times re-direct; it has struggled with the ordinary challenges that come with different stages of development and organizational maturity. At each pause, EOYDC has managed to right itself – to refocus, to clarify, and to resume pace. Part of what enables the organization to do so is “talent and leadership,” one of the seven factors cited in the Foundation’s Resiliency Guide.⁴ EOYDC is guided by a board and leader who together offer an aligned and compelling vision that attracts talented staff and supporters to the persistent pursuit of learning and improvement.

Where Character Fits In

EOYDC credits the Foundation with helping to bring the concept of character into sharp relief, not only as a focus, but as the lens through which the organization now sees and describes the world. Relying on the Character Counts! curriculum and training, the EOYDC team acknowledges the value of having a framework and also acknowledges the challenges that this particular framework confers for their community. The Character Counts! framework is based on what its developers call a “consensus of values” reflected in the six Pillars of Character: Trustworthiness, Respect, Responsibility, Fairness, Caring, and Citizenship. The programs, lessons and materials are organized around these six ethical values. The framework assumes that these are values on which everyone can agree, but EOYDC staff described the challenge to balance fidelity to the pillars with cultural compatibility.

Character is about whole person development and I get that, but citizenship doesn’t resonate for me, and I think we need to appreciate that different cultural contexts require different approaches to these concepts – and that what we should attach ourselves to is the intention underlying the concept and the construct.

In this case, staff offered the concept of “engagement” or “community” as alternative concepts to citizenship. The team went on to raise similar questions around the pillar of “trustworthiness” and how in their work with young people, they tend to substitute “authenticity” for “trustworthiness.”⁵

⁴ The [Resiliency Guide](#), published by the Foundation in March 2016, is a framework for assessing and strengthening organizational resiliency.

⁵ This is an important issue for the Foundation to consider as it moves forward on the national character development work. It suggests the need to ensure that those responsible for implementing a framework have the flexibility to adapt and refine it in ways that meet the unique needs of the community, culture, and context within which they operate.

For EOYDC, what began as an exploratory conversation with the Foundation about the role of character in working with youth evolved into not only new classroom practices, but an agency-wide embrace of character-based values and a meaningful grappling with how to make the concepts of character real in the community served. By the adoption of the 2012 strategic plan, character development had achieved front and center stage as one of what are three promises EOYDC makes to the community – a promise “to nurture the development of the social and emotional character of each youth and young adult” it serves.

When the Foundation funded EOYDC staff to attend the Character Counts! training, the Center had an implicit commitment to character development but not a common framework or language to enable shared practice. The training inspired staff to take up the character cause with vigor, and over time, staff brought the concepts of character to every aspect of agency program and practice – including, most recently, a staff recognition program that hails outstanding character traits among employees. The tagline for EOYDC now reads, “Building Character to Build Communities.”

The Foundation also supported EOYDC’s capital campaign to improve physical infrastructure and create a beautiful, safer, and more inviting haven in a neighborhood that is deeply challenged. With a growing facility and a clear commitment to purpose, EOYDC faced its next set of organizational needs and priorities: building leadership capacity and addressing issues of succession. To these important ends, the Foundation provided financial support that enabled EOYDC to reconfigure and expand its leadership team, clarify roles, distribute power and authority more broadly, and engage next generation leadership in decision-making. The Foundation’s support of EOYDC, simply stated, has come at critical moments to address critical needs and has been no less than transformational in its impact.

CASE STUDY #4: LARKIN STREET YOUTH SERVICES

Nine grants totaling \$1.05 million

Even though the Foundation has such clear commitment to a particular frame (character development), they were able to understand how our work relates and supports that frame and they funded us to continue to learn – to collect data, evaluate our effectiveness, and share our learning.

The Foundation was an early adopter of our focus on data collection – building our capacity to collect and use information more effectively so that our programs are better tailored to the needs of our clients.

Context

Larkin Street Youth Services was founded in 1984 as a drop-in center to provide homeless youth with a safe and supportive place off the streets. Over time, the agency responded to emerging and evident needs – extending substance abuse treatment services, temporary shelter, outreach and referral services, transitional housing, and eventually the nation’s first comprehensive housing program for HIV+ youth, entitled Assisted Care.

Larkin Street offers a continuum of support with pathways into services and pathways up to housing. Its goal is to place homeless youth in permanent housing by moving them along this continuum. The challenge is that there is no single profile of “homeless youth.” There are many roads to homelessness – from severe mental health challenges to complicated lives and

everything in between. The variation in need leads to a variation in the nature, dosage, and type of services required to achieve impact.

We are very clear now about the nature of the services needed – housing, education, employment, and life skills – but we have less precision when it comes to dosage or even the role that time plays. How much of what service provided for how long to achieve a positive outcome depends so much on the nature of the individual and the experiences he/she brings forward. This level of discernment means we need to keep advancing our understanding of the population – we need to collect more information and use it more wisely. The Foundation has helped us advance this vision and given us the confidence and resources we need to critically examine what we do and develop better ways of doing it.

Larkin Street is a home-grown gem that holds its place as a point of reference – a beacon – to which cities across the nation look in addressing the needs of their homeless youth populations.

The Foundation's Support of Larkin Street

The Foundation supported the agency across a range of needs: programming, data collection, thought leadership, and planning.⁶ The support evolved as the agency evolved. Early investments were in employment and education programs, including independent living and economic self-sufficiency. In more recent years, the Foundation invested in strategic planning, research, and evaluation, as well as knowledge dissemination. The evolution of support reflects the Foundation's willingness to align with its grantees' needs. Larkin Street notes that the most recent support enabled the agency to develop a more precise and client-centered approach to program and service delivery.

The Foundation was an early investor in Larkin Street's growth campaign, which focused on collecting, using, and sharing information more effectively – both internally and externally. This support left Larkin Street with greater capacity and confidence that it has the evidence necessary to demonstrate progress and impact. This past year, Larkin Street established a new position to “marry” or bridge the work of data with the work of program internally so that there would be a continuous learning loop and an even greater embrace by program of the value of data.

We want to expand services and deepen impact. Having data allows us to pursue both – really well.

Larkin Street gives credit to the Foundation for enabling the organization to build out its data orientation and capacity, which has helped to codify the program model, clarify outcomes, and measure progress.

[The Foundation] has benefited us and our population enormously. They were an early investor in organizational capacity building to grow our ability to collect information – to share information, to learn from information, to really assess our success and modify our strategies accordingly. They have provided long-term consistent support; and at times when the going got rough, they were our excuse to maintain our support of data infrastructure and services when there was pressure to focus only on program and direct services.

⁶ The Foundation's initial interest in Larkin Street stemmed from the organization's focus on economic self-sufficiency.

We have experience with funders who think of themselves as having high standards of accountability (and sometimes they do) but don't appreciate the amount of resources they require us to use just to meet those standards, which may or may not have anything to do with our intended outcomes. We become experts in compliance at a pretty hefty cost.

Looking Ahead

While sad to see the Foundation closing its doors, Larkin Street is confident about its own future. The organization readily acknowledges the role the Foundation has played through its financial support and its style of giving in helping the agency achieve its current stability and invest intelligently to assure a bright and impactful future.

Where Character Fits In

Larkin Street notes the deep alignment of interest between the Foundation's focus on character development and the organization's desire to enable young people to have the judgement and skills required to make good life choices, appreciating that these are young people who have faced bad circumstance but are not inherently bad people.

We assume these young people are good – that they strive to be good – that they are living lives that reflect the trauma they face. Helping children and young people develop into good adults is critically important – so long as we appreciate that circumstances can lead people to engage in bad actions and bad behaviors, and that doesn't make them bad people.

CASE STUDY #5: FIRST PLACE FOR YOUTH

Six grants totaling \$750,000

The Foundation's commitment and support of our work validates and honors us and more importantly, honors the experience of the young people.

The Foundation supported our Career Pathway work – it's incredible – and they should know the difference it is making in the lives of our youth.

Context

First Place for Youth was established in 1998 to “help foster kids build the skills they need to make a successful transition to self-sufficiency and responsible adulthood.” First Place started by providing support in education, financial literacy, employment, and housing. Over the years, it has grown and expanded its reach, providing services last year to nearly 2,300 current and former foster youth in five California counties across the state: Alameda, San Francisco, Contra Costa, Solano, and Los Angeles. First Place has adopted a “scaling philosophy,” by which it is expanding beyond the provision of direct services to include a policy focus and using policy to scale. The organization works deliberately now on advancing public policies and public funding that will create a stronger and more effective foster care field overall. First Place prides itself on being outcomes-driven and evidence-based. Ultimately, its leadership describes its ambition as leveling the field, or “eliminating the disparity between young people who have been in foster care and those who have not as it relates to earning potential, early pregnancies, and college and career success.”

The Foundation's Support of First Place for Youth

Since 2009, the Foundation provided support to enable First Place for Youth to implement the priorities as articulated in its strategic plan. These priorities evolved over time and included creating a Volunteer

Program to support foster youth in transition, data collection, evaluation, public awareness, and most recently the final grant to support sustainable expansion of its Career Pathway Initiative – an integral component of the employment readiness aspect of the work of First Place.

The Foundation provided support throughout this whole developmental journey – “Bechtel funding helped us implement our strategic plan – pursue scale, evaluate our model, and test, refine, and sustain new programs.” Agency staff credits the Foundation with nurturing the agency from an early childhood stage to an adolescent stage of development, where it is now. The agency has achieved a level of organizational maturity while maintaining bold ambition. This is an organization led by a young charismatic leader, Sam Cobbs, who possesses the vision as well as the energy and tenacity to pursue it.

Cobbs recalls early conversations with Marcia Argyris about the concept of character development – what it means and how it relates to his work with youth who are aging out of foster care. These were consequential conversations at an important stage of the agency’s development. By design, First Place aims to engender in young people the judgement and skills they need to make good and healthy choices – for themselves and for the community at large – a reflection of character in action.

Looking Ahead

On the one hand, First Place has traveled a great distance with Foundation support – to understand the challenges of foster care youth in transition, to develop programs and services that support youth in making successful transitions, and to advocate for policies and funding streams that enable the scaling of better practice and better outcomes overall. On the other hand, 60% of foster youth are likely to have come from a family that was also in foster care, and the average tenure of association with First Place is 14 months, after which the agency loses track of many of its clients.⁷ There is a need to break the intergenerational transfer of the foster care experience, and there is also a need to create better systems for interagency data sharing so that it is possible to track employment, housing, and education outcomes for youth who have transitioned out of foster care. This is all work that First Place knows must be done. As the agency moves to its next stage of development, albeit without the benefit of further Foundation support, it has the appetite and the ambition to take it on.

Where Character Fits In

First Place gives credit to the Foundation for explicitly raising the question of character, giving the agency pause to consider where and how character fits into its work with youth, and how to measure progress in character development. Foster care youth live in the context of a highly-controlled environment – a system designed to limit liability and protect the youth from harm.

Youth aging out of foster care need an opportunity to grow their ability to make choices, and they need an opportunity to learn what constitutes a good choice. They also need to acquire empathy in the process so that their choices are made not only with consideration of personal impact but how their choices affect the larger community.

Our kids need to know what the right choice is and then they need to experience making that choice.

⁷ There are notable exceptions with former First Place youth returning as mentors and role models.

The First Place team does not employ a specific framework, but thinks of character development in the context of building resilience and enabling youth to make difficult decisions.

Foster care kids live controlled lives. They are given few choices. They don't have an opportunity to practice decision-making. Think about that.

To facilitate decision-making ability, First Place helps build a “circle of support” whereby each young person identifies those on whom they rely for advice and direction. Sometimes these circles are built around a particular career path and other times they are more general in nature. First Place works with youth to develop a sense of connection, confidence, attachment, and trust – to feel part of something larger than themselves.

For our kids, building good, healthy relationships is key to successful transition to independence, and it goes hand-in-hand with managing emotions and being able to distinguish between good and bad intentions.

The First Place team acknowledges the need to establish why character is important – to broaden the definition of a successful life beyond having money, which they note is too often equated with success.

Peer coaching is the best method for conveying this. When our alumni come back with their success stories, it really matters to our kids.

LASTING CHANGE AND LESSONS LEARNED

Focusing on the five grantees profiled in this study, the value added by the Foundation's support is dramatic and positive. Significant organizational and programmatic changes have been achieved that will be sustained long after the Foundation sunsets:

- Girl Scouts of Northern California invented, shared, and employed new methods for reaching marginalized populations, training volunteers, and teaching space and science education.
- The YMCA of San Francisco adopted a unified approach to training adults across all branches on best practices in youth development. The “train the trainer” approach is creative, dynamic, effective, and self-sustaining and can serve as a model for other content area professional development efforts.
- EOYDC embraced “character” as core to its organizational identity, a promise it makes to the community. The organization renovated its facility, honed in on its priorities, created a new leadership structure, and is developing new capacities to carry it well into the future.
- Larkin Street is using data more effectively both in program and advocacy, and initiated structural and staffing reforms that enable a better connection to be forged between data and program with a focus on improving outcomes for youth.
- First Place for Youth improved its use of data and refined and further codified its model, making it possible to promote its work more broadly and to greater effect.

These are all manifestations of dollars well spent. As the Foundation exits the community and the field, it can do so with a sense of accomplishment and also confidence. These changes will endure over time and produce better organizations, better services, and better outcomes for the young people about whom this work has always been.

Lessons Learned

Much of what was heard during this review process was positive and affirming of how the Foundation engaged with and supported grantees and the great benefit that accrued as a result. Cognizant that the Foundation may have an opportunity to share its experience with others in the field, a number of observations and associated recommendations were made or surfaced during the review process that are worthy of consideration. These include:

Create opportunities for grantees to learn together. A number of grantees expressed regret at having not had the benefit of meeting with others in the portfolio to share experience and exchange wisdom on common challenges and issues of interest. There was particular interest expressed in meeting on the issue of measurement and data.

Bechtel is unique in how they have put character development forward. But the critical challenge to all of us – and to Bechtel as they exit the field – is how do we measure it? How do we know whether in fact our work, our approaches, are cultivating good character? We have not found metrics yet to help us establish that connection.

We wish there would have been an opportunity for us to come together – those of us in the portfolio – to talk about what character is – how we incorporate it and ultimately how we measure it.

- Create “collective intelligence” across grantees in a portfolio. Bring grantees together on a consistent basis for sharing and learning. Measure the value and effectiveness of this investment by the strength of the connections made among grantees (network development) and the exchange of practice and knowledge.
- In consultation with grantees, develop consistent or ensure consistency in some basic standards (measures) of progress and provide assistance in meeting those standards.

Communicate with peer funders. There is great potential benefit to grantees in bringing their work to the attention of colleagues in the funding community. As the Foundation nears its sunset, grantees wish there were other funders teed up to understand and support their work and to do so in ways that are consistent with the Foundation’s trust-based approach.

I think when you lose a thoughtful funder who understands the value of building a relationship and is invested for the long-haul, it is significant. Not every foundation is as transparent or as thoughtful as the team at Bechtel has been – even in the process of closing out our grant, they gave us time and attention in that process as well.

- Communicate more and more often with colleagues in the funding community about the work of grantees. When feasible, partner with other funders to share the learning and responsibility and to create pipelines of alternative support for those grantees you believe are effective.

Understand the challenges of growth. It is exciting and even satisfying to see and support organizations that are growing their capacity and growing or improving their facilities. But growth requires a long-range view and thoughtful financial planning to ensure that the changes can be sustained and supported not as one-time expenses but over-time responsibilities.

The renovation campaign became an \$11.5 million expansion campaign. We still have to raise support for furniture even though building construction is fully funded.

- Anticipate and work to mitigate the risks associated with growth. Focus attention on organizations in growth or capital campaigns to better understand their business models going forward. How will they support the ongoing costs associated with growth? What are their sources of investment capital and sustaining capital?

Think about succession to ensure lasting success. It is not unusual to find charismatic leadership associated with high-performing, energetic, and bold organizations. Smart money follows strong leaders. But strong leaders don't live or stay forever, and it is essential, especially when the work is of critical importance to community, to be mindful of leadership succession.

People ask me, what will happen when you move on? But unless my health gives out, I have no plans to move on.

- Especially in cases where grantee organizations are led by charismatic or long-tenured executives, inquire about succession planning. Ask how the organization thinks about and plans for the future – whether and how they develop internal capacity that can sustain the organization for the long haul.

FINAL THOUGHTS

The grantees profiled in this document and the lessons drawn from their experience reflect the true balance required between the art and science of “good giving.” The Foundation demonstrates in its practice that one must be mindful and also “heartful” – strategic and also passionate, curious and also trusting – to achieve the full benefits of philanthropic pursuit. By the personal accounts this report reflects, the Foundation has successfully achieved this delicate balance and as a result leaves both a lasting and beloved impression.

APPENDIX

LIST OF INTERVIEWEES

YMCA of San Francisco

- Linda Griffith, Vice President for Risk Management and Legal Affairs
- Suzanne Medina, Associate Executive Director of Urban Services

East Oakland Youth Development Center

- Regina Jackson, President and Chief Executive Officer
- Selena Wilson, Vice President for Organizational Effectiveness
- Anana Scott, Education and Career Coach
- Talia Taylor, Pathway to College and Career Manager

Larkin Street Youth Services

- Sherilyn Adams, Executive Director
- Haley Mousseau, Director of Knowledge, Dissemination and Learning

First Place for Youth

- Sam Cobbs, Chief Executive Officer
- Kathy Jacobson, Chief Operating Officer
- Emily Jensen, Director of Programs
- Tanya Goins, Community Service Manager
- Mounir Tyler, Program Director

Girl Scouts of Northern California

- Marina Park, Chief Executive Officer
- Cinnamon Daniel, Director of Research and Evaluation
- Kymberly Miller, Senior Director of Program
- Monica Yu, Director of Institutional Giving
- Jean Fahey, Program Director for Funded Programs and Partnerships
- Kerry Barcellos, Program Director for K-5 in Richmond

ABOUT THE AUTHOR

Jill Blair has more than two decades of experience creating and leading nonprofit and for-profit organizations, working in the field of philanthropy as a program officer for youth, serving as a special assistant to two New York City Public School chancellors, and more recently, providing consulting services to nonprofits and philanthropy on issues of strategy, culture, leadership, and organizational development. Current and recent clients include: The Ford Foundation, The Sonoma Community Foundation, The Voice of the People, The Raymond John Wean Foundation, IGNITE, The Aspen Institute, Livingroom Conversations, PolicyLink, The Peninsula Jewish Community Center, The Henry M. Jackson Foundation, and The Bill and Melinda Gates Foundation.

Specific to this assignment, as chair of a San Francisco-based foundation board, Jill initiated and presided over the decision to spend out \$16 million in assets. While the scale of that effort is diminutive in comparison with the S. D. Bechtel, Jr. Foundation's spend out, the process of exiting a field carries with it similar responsibilities and challenges.

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